



Modifying Existing Workflow

- The existing workflow is a parallel process meaning all approvers are notified simultaneously.
- To have an editor review before the approval the existing workflow must be modified
 - To modify existing workflow,
 1. **Navigate** to *Pages in View All Site Content* for your site
 2. **Click** *Settings Drop Down*
 3. **Click** *Document Library Settings*
 4. **Click** *Workflow Settings*
 5. **Click** *Existing Workflow Listed*
 6. **Enter** *Appropriate Choices*
 7. **Click** *OK*



Modifying Existing Workflow

1. Navigate to *Pages* in *View All Content* for Site

MARINES
THE FEW. THE PROUD.

Home | News | Units | Recruiting | Training & Education | Career | Marine

Pages

- View All Site Content
- Kathy Home**
- Mission
- News
- Units
- Press Releases
- Photos
- Links
- POC

Settings

- Create Column**
Add a column to store additional information about each item.
- Create View**
Create a view to select columns, filters, and other display settings.
- Document Library Settings**
Manage settings such as permissions, columns, views, and policy.

Type	Name	Modified	Author	Status	Page Layout	Parallel Approval
default	default	11/7/2007 12:00 PM			Unit Home Layout	
links	links	10/31/2007 1:10 PM			Stephens CTR Tony	Generic Layout with a single column.
mission	mission	10/31/2007 1:10 PM			Stephens CTR Tony	Generic Layout with Two Columns
news	news	11/8/2007 2:05 PM	Gessner CTR Kathy	Approved	Stephens	Generic
photos	photos	11/8/2007 2:10 PM	Gessner CTR Kathy	Approved	CTR Tony	Layout with a single column.
poc	poc	10/31/2007 1:10 PM	Gessner CTR Kathy	Approved	Stephens CTR Tony	Generic Layout with a single column.
pr	pr	11/7/2007 9:17 PM	Gessner CTR Kathy	Draft	Gessner CTR Kathy	Stephens CTR Tony
units	units	10/31/2007 1:10 PM	Gessner CTR Kathy	Approved	Stephens CTR Tony	Generic Layout with a single column.

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2. Click *Setting Drop Down*

3. Click *Document Library Settings*



Modifying Existing Workflow

Home > Units > Marine Forces Korea > Kathy Test Site > Pages > Settings

Customize Pages

List Information

Name: Pages

Web Address: <https://author.marines.mil/units/marfork/kathy/Pages/Forms/AllItems.aspx>

Description: This system library was created by the Publishing feature to store pages that are created in this site.

General Settings

- Title, description and navigation
- Versioning settings
- Advanced settings
- Manage item scheduling
- Audience targeting settings

Permissions and Management

- Permissions for this document library
- Manage checked out files
- Workflow settings**
- Information management policy settings

Communications

- RSS settings

Content Types

This document library is configured to allow multiple content types. Use the settings below to specify the content types that are displayed on the site, their policies, workflows, or other behavior. The following content types are currently available in this library:

Content Type	Visible on New Button	Default Content Type
Page	✓	✓
Welcome Page	✓	
Generic	✓	
News Story	✓	
Press Release	✓	

- Add from existing site content types
- Change new button order and default content type

4. Click *Workflow settings*



Modifying Existing Workflow

Home > Units > Marine Forces Korea > Kathy Test Site > Pages > Settings > Workflow settings

Change Workflow Settings: Pages

Use this page to view or change the workflow settings for this document library. You can also add or remove workflows. Changes to existing workflows will not be applied to workflows already in progress.

Workflows



Workflow Name (click to change settings)

Workflows in Progress

Parallel Approval

0

- [Add a workflow](#)
- [Remove a workflow](#)
- [View workflow reports](#)

5. Click *Parallel Approval* or the name of the existing workflow if it has been renamed



Modifying Existing Workflow

Home > Units > Marine Forces Korea > Kathy Test Site > Pages > Settings > Workflow settings > Add or Change a Workflow

Add a Workflow: Pages

Use this page to set up a workflow for this document library.

Workflow

Select a workflow to add to this document library. If the workflow template you want does not appear, contact your administrator to get it added to your site collection or workspace.

Select a workflow template:

Approval
Collect Feedback
Collect Signatures
Disposition Approval

Description:

Routes a document for approval. Approvers can approve or reject the document, reassign the approval task, or request changes to the document.

6a. Change *Name* for Workflow

Type a name for this workflow. The name will be used to identify this workflow to users of this document library.

Type a unique name for this workflow:

Test Workflow

6b. Leave *Defaults* for Task List and History List unless you want to track separately

Select a task list:

Workflow Tasks

Description:

This system library was created by the Publishing feature to store workflow tasks that are created in this site.

Select a history list:

Workflow History

Description:

A system library used to store workflow history information that is created in this site. It is created by the Publishing feature.

Start Options

Specify how this workflow can be started.

6c. Select *Start Options*

☒ Allow this workflow to be manually started by an authenticated user with Edit Items Permissions.

☐ Require Manage Lists Permissions to start the workflow.

☒ Start this workflow to approve publishing a major version of an item.

☐ Start this workflow when a new item is created.

☐ Start this workflow when an item is changed.

6d. Click *Next*

Next

Cancel



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6e. Select Workflow Tasks

6f. Determine Workflow Start Values for Approvers, Due Date, Notification of others

NOTE: Approval groups need to be in the order you want them to approve.

6g. Determine How Workflow is Completed

6h. Determine Post completion Workflow Activities

NOTE: If you want to add a group as an approver, the group must be created first if it does not exist.

Home > Units > Marine Forces Korea > Kathy Test Site > Pages > Customize Workflow

Customize Workflow: Test Workflow

OK Cancel

Workflow Tasks
Specify how tasks are routed to participants and whether to allow tasks to be delegated or if participants can request changes be made to the document prior to finishing their tasks.

Default Workflow Start Values
Specify the default values that this workflow will use when it is started. You can opt to allow the person who starts the workflow to change or add participants.

Assign tasks to:

- ☐ All participants simultaneously (parallel)
- ☒ One participant at a time (serial)

Allow workflow participants to:

- ☒ Reassign the task to another person
- ☒ Request a change before completing the task

Type the names of people you want to participate when this workflow is started. Add names in the order in which you want the tasks assigned (for serial workflows).

Approvers...

☐ Assign a single task to each group entered (Do not expand groups).

☒ Allow changes to the participant list when this workflow is started

Type a message to include with your request:

Due Date
If a due date is specified and e-mail is enabled on the server, participants will receive a reminder on that date if their task is not finished.

Tasks are due by (parallel):

Give each person the following amount of time to finish their task (serial):
1 Day(s)

Notify Others
To notify other people when this workflow starts without assigning tasks, type names on the CC line.

CC...

Complete this workflow when:

- ☐ Following number of tasks are finished:

Cancel this workflow when the:

- ☒ Document is rejected
- ☒ Document is changed

Post-completion Workflow Activities
Specify the actions you want to occur after the workflow has been successfully completed.

After the workflow is completed:

- ☒ Update the approval status (use this workflow to control content approval)

OK Cancel

7. Click OK